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ABSTRACT

This paper presents an outline for a plan for increasing OCLC cataloging statistics in the monograph cataloging unit of a medium-to-large academic library, along with the evaluation process used to achieve this goal. The focus of the plan was on a group of upper level paraprofessional staff. First, OCLC cooperative cataloging was redefined to include all member copy regardless of quality, with editing done to update obsolete name and subject headings and verification of call numbers. Staff members unfamiliar with the Library of Congress schedules received training. Evaluation was based on monthly statistics, with individual targets set through monthly conferences. Failure to meet quotas was met with commiseration, additional training, and reevaluation. The plan was successful, with an increase of 2,700 titles over the course of one year, 1,800 of which were contributed by the paraprofessional staff. In addition, morale and professional/paraprofessional cooperation increased, and quota setting eventually became unnecessary, with the paraprofessionals now setting and maintaining their own pace, and managing their own time and workloads. (EW)

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PARAPROFESSIONAL PUNCH

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ABSTRACT

GOAL: To increase OCLC cataloging statistics

OBJECTIVE: To increase each paraprofessional's individual statistics by 25% within one year

STRATEGY: Combination of strategic and tactical planning in redefining OCLC cataloging, making use of subject and language expertise, and supplying individualized formal training for paraprofessional staff to handle newly adjusted level of cataloging

In this paper and presentation, I intend to outline my plan for increasing OCLC cataloging statistics in a monograph cataloging unit of a medium-to-large academic library cataloging department, as well as the evaluation process used to achieve this goal.

This plan was enacted in a real life setting, end result-- a net gain of 2,700 titles cataloged over the previous year's statistics.

In this paper I will outline my plan for increasing OCLC cataloging statistics in a monograph cataloging unit of a medium-to-large academic library cataloging department, along with the evaluation process used to achieve this goal. The focus of this paper is on a group of upper level paraprofessional staff, all with at least 8 years tenure in the Cataloging Department.

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OCLC cooperative cataloging (known also to some as 090, member copy, or edit copy) to be distinguished from copy cataloging or original cataloging had traditionally been defined as OCLC member copy which contained subject headings and "useable" call numbers. Those records lacking call numbers or bearing classed together set numbers which we chose not to use were excluded. These were considered "unuseable" call numbers.

OCLC records falling into these latter two categories were deemed original cataloging. These items were placed on hold shelves for original catalog librarians-- all 2.5 of us. Original catalogers found it difficult to keep up with traditional original cataloging (items with no records in OCLC), much less find the time to handle OCLC coop rejects.

The Library had a backlog of 18,000 volumes, so placing these items on cataloging hold shelves was an effort in futility. Hold shelf overloads were later sentenced to the "black hole", an underground storage facility accessed via the parking garage. This plan was not meant to solve or bemoan understaffing or cataloging backlogs [I pause now for a few groans], but the results affected both in a very positive way.

Let me give you a little background on the Department. I was the Head of a Monograph Cataloging Unit within a larger Catalog Department. There were 4 upper level paraprofesionals and 3 librarians, including myself, in the Unit. I had one professional vacancy. The Unit's primary responsibility was for OCLC cooperative and original monograph cataloging in all formats. There were separate Units for serials and copy cataloging.

I had been in this position for about six months observing and monitoring my Unit and came to the conclusion that the knowledge and expertise of my paraprofessional staff was greatly underutilized. Cataloging statistics were low in comparison with other institutions of similar size and staff. Cumbersome manual authority processes, lack of workflow streamlining and outmoded cataloging routines were factors. The Unit Head position had been vacant for 1 1/2 years before I came on board and the Head of Cataloging position was also vacant. I had just lost a catalog librarian to retirement and my vacant professional position was frozen due to budgetary constraints. [Some of you are smiling-- sound like a familiar scenario?] I chose to focus on my paraprofessional staff as the target group since their primary responsibility was OCLC cooperative copy and our largest backlog was in this area. Remember the "black hole"? I was determined not to get bogged down in past procedures or waste time writing tomes of new ones-- not yet anyway. I approached the plan as a fieldtest to be implemented in phases; monitored, reviewed, and when successful, put to policy.

First step, I redefined OCLC cooperative cataloging to include **ALL** member copy, regardless of the quality-- yes, I merged useable and unuseable copy. With a growing backlog, increase in acquisitions and shortage of cataloging personnel, we could no longer afford or justify being **overly** critical of member copy. Upon verification, editing was done to update obsolete name and subject headings. Call numbers, if present in the bibliographic record, were verified in the appropriate schedules.

OCLC hold shelves would now contain all cooperative copy. Coop copy lacking subjects and/or call numbers required classification and subject analysis, usually deferred to catalog librarians. I felt my paraprofessionals had the expertise and were up to the challenge, and I was confident that I could lend the moral support when necessary.

Two of my paraprofessionals were very familiar with LC schedules and occasionally contributed original cataloging in their unique languages of expertise. The other two paraprofessionals required a more intensive introduction to the schedules, but both had responsibilities for cataloging nonbook materials such as audiovisuals and microformats. They also had language and subject expertise. I felt my paraprofessional staff were up to tackling the objective put before them which was to raise OCLC coop cataloging (now newly defined) statistics by 25% in the coming year.

Evaluation was accomplished using an individual's monthly cataloging statistics, recorded by level of cataloging difficulty (LC, Coop, Original). Using these statistics, mutual quota setting, and monthly conferences, which I will outline in my evaluation process, individual targets were set. As each month progressed, it became apparent through individual successes and failures, what steps were needed to achieve the desired target. Successes were met with recognition and praise, this information forwarded to administration and announced at Unit meetings. Quotas were reevaluated and in some cases set slightly higher, often at the cataloger's request. Failure was met with commiseration, additional training, and reevaluation. Unplanned

personal leave or quotas that were set too high were factors.

Since my paraprofessional staff were veterans of the Unit, I did not wish to require formal training initially, unless requested by the staff themselves. The project began after several group discussions took place, outlining the plan and evaluation process for the benefit of the whole Unit. Expectations were made clear and consultation was readily available within the Unit. The professional staff were very supportive. Initial group sessions allowed for an exchange of ideas, as well as anxiety commiseration.

The first month was a trial run, allowing individuals to attempt what they could, giving them the freedon to choose their own materials in a particular subject, language or area of interest. (Sort of like browsing the hold shelves with a supermarket cart.) OCLC coop cataloging was previously distributed by date and special format. The old "you can't catalog a book before its time" reasoning. It seemed that because an item was not cataloged by the Library of Congress, we put it on hold shelves to punish it. In fact, we called the process LCH (Library of Congress Hold), which for you acronym lovers was just a term of endearment for the backlog. I would now like to share with you the evaluation and planning process.

THE EVALUATION PROCESS

1) Target area is an increase in OCLC cataloging statistics for 4 paraprofessionals within a monograph cataloging unit of a large academic library catalog department.

2) The target is an increase of 25% from the current level of cataloging achievement performed by 4 paraprofessionals over a period of one year.

3) As Head of the Unit, I will closely monitor OCLC cataloging throughout the months prior to beginning the project. Using individual cataloging statistics from the previous 3 years, the employee and I will mutually set individual quota to be met by the end of each month. I chose the last 3 years, as automation activities for an online catalog began at this time, diverting cataloging production and energies. These statistics would represent a more realistic picture of our workload potential. Committee assignments, automation projects, personal leave, etc. will be taken into consideration to ensure that the quota is attainable.

4) Immediately after monthly statistics are submitted, individual conferences will be set up to evaluate successes and failures to meet quota. Production levels for the next month will be established using the same method as in 3.

5) On a quarterly basis, I will compare the target with the actual OCLC cataloging statistics at hand and assess how close we are to achieving the objective. If the result is negative, additional individualized or formal group training will be provided and language skills and subject specialties will be further evaluated.

6) Cataloging quotas are established on an individual basis, taking into consideration the different levels of language and subject expertises (This has been neglected to some extent in assigning duties to paraprofesionals.) and recognizing the

varying levels of past performance in relation to future potential. Appraisal will also be done on an individual basis, acknowledging meritorious or inadequate performance accordingly. It is not realistic to expect all 4 individuals to perform at the same level in the same manner. It is hoped that "super" achievers will complement average achievers producing the desired goal for the Unit.

7) Evaluation will be done on a monthly basis during individual conferences. Suggestions for further cataloging streamlining, training, and aid in authority work will be solicited and well taken. Unforseen automation activities, emergency leave, or other department projects which demand full staff involvement may force the target timeframe to be extended.

In conclusion, I am pleased to say that the plan was a success. The Monograph Cataloging Unit cataloged 2,700 more titles than the previous year (on top of additional automation duties), 1,800 of those titles contributed by paraprofessional staff. Now that's PUNCH! A wonderful side effect was that paraprofessional staff morale was boosted and we began to function more closely as an original cataloging unit. Professional and parafessional catalogers attended OCLC workshops and conferences together. There was a growing sense of unity and a free sharing of expertise. I am pleased to inform you that those paraprofessionals are still performing in this manner; however, the quota setting is no longer necessary. They have set and maintained their own pace and are comfortable managing their own time and workload.

I offer my recipe for Paraprofessional Punch, along with these caveats: 1) it is the baker's perogative to substitute ingredients and 2) the finished product turns out different each time.

PARAPROFESIONAL PUNCH

* 2-4 paraprofessionals who are willing to experience the thrill of victory and the agony of defeat
  [Working with more may be difficult]

* Heaping tablespoons (to taste) of motivation and incentive
  [We had the "Backlog Buster" award]

* Heaping tablespoons of support, appreciation and respect
  [Respect was what staff considered most important-- to be respected for their knowledge and expertise]

* At least 2 strategies for training
  [Remember everyone learns in different ways-- use both auditory and visual methods]

* 2-4 copies of training materials, in-house and national
  [The investment is nominal compared to the satisfaction of having your own copy i.e. OCLC Books Format in which to scribble notes]

* A plan with a timetable
  [The latter preferably written in jello]

* An evaluation mechanism
  [It is important to let your staff know how they are doing]

* 1 party (but not limited to just one)
  [It is important to celebrate successes]

* A risk-taking manager and change agent who will find the time to make it work
  [Administrative support is also healthy and sure makes life easier]

Stir ever so gently and drink hearty!